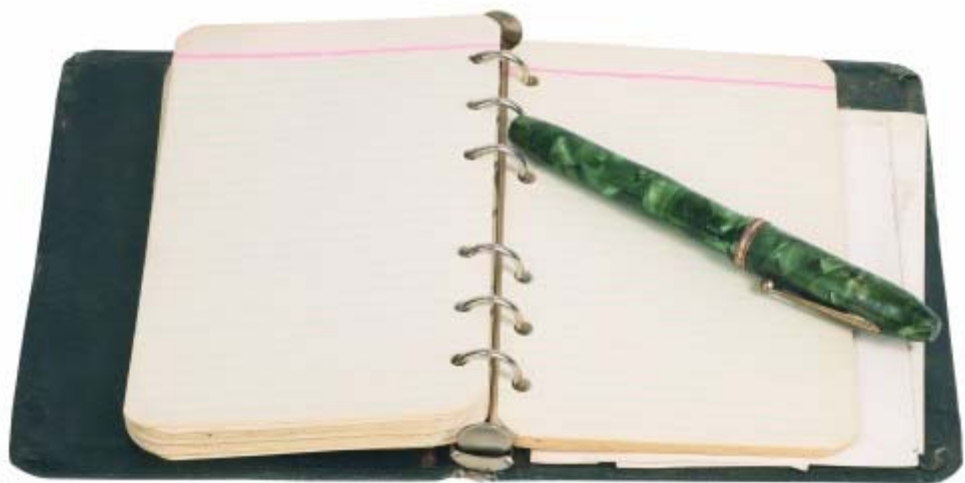


Project Handbook Report and Tool Kit

"How to write project handbooks that are clear, useful and get used"



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Author Profile



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Critical Eye Communications helps people to make the most of the new, social computing technologies in the working environment. Our bespoke courses are practically based and the emphasis is always on actually getting people to use these tools to make their working lives more efficient and enjoyable.

Stephanie is also working with the JISC-funded Repository Support Project (RSP) which aims to assist institutions to develop a deployed network of inter-working repositories for academic papers, learning materials and research data across the UK. The RSP will co-ordinate and deliver practical advice to English and Welsh HEI's regarding implementation, management and development of these repositories.

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Introduction

By Stephanie Taylor

"... projects can falter and even ultimately fail not because the technology wasn't suitable for purpose but because the users failed to understand how to use and apply the innovations in their working environment."

Introduction

Mention project documentation and the usual set of documents aimed at keeping things on track come to mind – the project plan, initiation documents, reports etc -- in short, all the documents designed for the project manager and project board. But there is often a forgotten audience who are just as important to the success of the project. These are the people who will ultimately be working with the innovations being introduced. They can be staff within an organisation or end users or both, depending on the nature of the project. But they will have one thing in common: they will know very little or even nothing at all about the project itself prior to their active involvement.

As these users are often involved in testing and trialling the innovations it is in everybody's best interests that they know about the project and understand what is expected of them. The development or introduction of new technologies is especially vulnerable to failure if these people are not confident of the project aims and their own role within it. Without clear guidance it can be difficult for people coming into the project at a later stage to understand the aims and objectives. Identifying whether a problem is technical, operational or a training issue can be all but impossible. And projects can falter and even ultimately fail not because the technology wasn't suitable for purpose but because the users failed to understand how to use and apply the innovations in their working environment.

Take two local government offices, both running similar projects. Both projects are aiming to implement a document management system that will store and access local government reports and papers in electronic format. Both systems are able to handle documents in a wide variety of formats and both have functions that allow permissions to be set so that end users can use a simple login to see documents that have been categorised as appropriate for their requirements. Both systems are being implemented to support new national legislation. This legislation requires local government offices to store all documents in electronic format so that they can be security graded and accessed online by staff and/or the general public as appropriate.

The project team for Office A decide they don't need to create a project handbook. Instead, they plan to use the standard user manual that comes with their system and issue this to all team leaders along with their own departmental guidelines for assessing and grading documents for security and public access. After all, the system is easy to use and the need to grade and release documents a major local government initiative. So everyone should already be aware of the reasons behind the project and how important the implementation is in ensuring the office can meet the new national requirements.

At first blush, these are reasonable assumptions. But problems arise: the first problem users find is that the standard user manual covers everything – and most people only need to use a fraction of the system. Users grow increasingly uncertain of what exactly they should be doing. They are also worried about the security levels. The administrative guidelines give great emphasis to the

Introduction

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What is a project?

The term 'project' is used in this report to define any structured and managed introduction of change that affects the work of staff and/or patrons. The introduction or modification of technology is often associated with projects, but projects can also cover new working practices or the modification of existing procedures that don't use technology. The implementation of new services to staff or patrons is another kind of project.

importance of keeping confidential papers secure, but the users lack the understanding of the way the system works to feel confidence in how documents are graded for secure access. This uncertainty further undermines their confidence in the system. Rather than risk making public their confidential documents, the teams drag their feet and convert only a handful of papers to electronic format. They feel justified in doing this as, overall, the implementation has taken up a lot of staff time already for very little gain from their perspective.

The project team for Office B also think that their system will be easy to use. But they think that their staff need help in bringing together the requirements on the administration side, as set out in the guidelines, and the new system. They create a handbook to help the different teams to manage their own implementations. Because they are bringing the two strands of the project together, they immediately notice that they can make implementation quicker and easier by giving simple step-by-step instructions that reflect the specific tasks their users need to perform, rather than the generic, cover-all approach of the standard manuals. They can also address the different parts of the administrative guidelines as they are applied to each specific team within the office. Finally, they are able to show through instructions and exercises how the practical security grading works, so users are confident that confidential documents are not viewed by the general public. Once the users have confidence in the system, they are keen to enter all their documents and build a valuable and effective resource for their office.

Office A: No Project Manual	Office B: Role-Specific Project Manuals
<p>Unwisely 'saves time' by pairing the standard system manual with a guidance document.</p> <ul style="list-style-type: none"> ▪ Results: ▪ Lack of staff buy-in ▪ Confusion regarding which elements of the system should be used ▪ Lack of confidence in the reliability and validity of the system ▪ Slow and incomplete implementation of the project ▪ Risk of noncompliance with regulation 	<p>Invests time and effort in developing specific project manuals for administration of new system.</p> <p>Results:</p> <ul style="list-style-type: none"> ▪ Provision of role-specific guidance, reflecting an understanding of the needs of staff who must implement ▪ Instructions are clear, specific to a team, and map directly back to project requirements ▪ Exercises instill confidence in the system and in the staff's ability to implement ▪ Staff enthusiasm for the value of the project ▪ Quick, thorough implementation ▪ Lowered risk of noncompliance

Figure 1 - A Tale of Two Projects

Introduction

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When Do You Need A Project Handbook?

A handbook can describe and support one-off projects, multi-phased projects and continuous process improvement projects. Projects can be small-scale. They can operate across a single office or team, exist organisation-wide, and be national or international in scope.

Basically, the introduction of any changes within the workplace can be supported by a project handbook, such as:

- The introduction of new technologies
- New versions and updates to existing technologies
- Changes to internal procedures such as acquisitions policies, staff performance reviews, risk management procedures etc
- Introducing new services such as desktop delivery of electronic documents, office recycling facilities etc
- Moving to a new office building!

"The secret to producing an effective handbook that will be used is to understand where the project will fit into the staff's current workflow."

Having worked on many projects, large and small, I have devised an approach to developing, writing and testing effective project handbooks, which serve as a kind of reference book to cover the needs of staff and other stakeholders who will participate in the project. The secret to producing an effective handbook that will be used is to understand where the project will fit into the staff's current workflow. Keep the document focused and practical. The aim is to create a reference book and a how-to guide in one. Include everything users might need to actually carry out their tasks and leave out anything that isn't strictly relevant to that purpose. The content of this report is the approach I use myself for starting any project handbook, and the activities in the Tool Kit will enable you to adjust the ideas herein to your particular needs. This approach is flexible and can be adapted to suit your needs. It easily scales up or down depending on the size and scope of your project.

Use this report

Project Manager:

- Review the report and tool kit for an overview of the concepts and steps in devising and creating a project handbook
- Identify appropriate project resources for working on tool kit activities
- Complete or manage tool kit activities.

Project Directors:

- Review the report for an overview of the concepts and steps in devising and creating a project handbook
- Approve allocation of project resources for working on tool kit activities
- Review completed workflows and scoping documents
- Review plan for handbook.

Staff Users & Project Stakeholders:

- Scan report for an overview of the concepts and steps within a risk management programme
- Scan the report for an overview of the steps involved in creating and maintaining a project handbook
- Collaborate on tool kit activities
- Participate in feedback exercises as an ongoing process.

✓ Tool Kit - Activity 1: From Workflow To Users

The following questions should be answered by a group or groups of users. Don't make a group too big – everyone needs the chance to be heard and big groups can mean people don't get a turn or maybe don't feel confident to discuss things.

Show them your draft workflow and explain how your project touches the processes in it. Then use the questions below as a starting point to lead discussion:

1. Is your project introducing something totally new to the users?
2. Is it changing the way they do an existing task?
3. Are you introducing new technology or a new service, or both?
4. Are there any other technologies that your project will interact with?
5. Are there any other operational procedures that your project will interact with?

Allow some time for general chat and encourage the group to look at the positive and negative aspects of the project as they perceive them too.

Aim to summarise the implementation and to list the areas of interaction you identify in points 4 and 5. You should now have an overview of the main areas the handbook will need to cover.

Summarise the perceptions of the group too, and look to define their level of experience and expertise with regard to the tasks they will be asked to perform in relation to the project. This will determine the tone of the handbook and the level of detail you will need in your step-by-step guide.

Following the session(s), use a table like the one below to capture and record what you've learned from the group:

User Group:	
General description:	
Role in project:	
Workflow/s used:	
Knowledge of project:	
Perception of project:	
Concerns:	
Requirements:	

FreePint FUMSI Report -- Project Handbook Report and Tool Kit



Project Handbook Report and Tool Kit

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Project handbooks that are clear and user-orientated will improve the success of a wide range of projects, both technological and process-driven. This report documents the steps required to write a useful project handbook, including understanding the needs of users, breaking project tasks down into essential steps, and building in mechanisms for useful feedback. The included tool kit of 7 hands-on worksheets guides project leaders in the activities required of them to create effective handbooks that contribute to the success of their projects.

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View a sample from this report, including table of contents, introduction and one tool kit activity:

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